

We have created some New Features to make electronic submission easier.

### EASIER to USE BLINE - Save & Resume functionality

#### What changes have been made?

The new functionality gives you the ability to:

- Start an electronic case record with minimal information and save to your online account
- Easily resume the application as you gather additional information which may not have been available or agreed earlier
- Manage with full visibility all your pre-submission cases through a new pipeline feature
- Retain cases in pre-submission for up to 60 days without adding any new details. When information is added a further 60 day window begins.
- Identify outstanding information on applications through clear signposting
- Navigate through the application more smoothly with the help of more meaningful messages and tips.

No information will be shared with Irish Life until you are ready to submit the application.

#### Features – what will be different?

This new enhanced functionality will be available for new Pension, Post Retirement and Saving & Investment applications only.

It does not apply to Protection and Top Ups and Transfers cannot be transacted in this way.

The ability to submit PRSA transfers electronically which previously existed has been disabled to facilitate the new process.

#### Let's get started!

This guide will bring you step by step through the Save & Resume functionality.

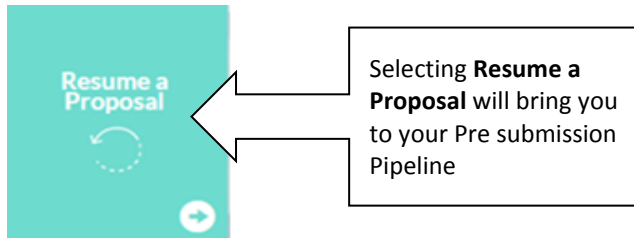
#### Enter Bline as normal

The screenshot shows the Bline website dashboard with the following elements:

- Top Header:** Bline logo and 'THE NO.1 BROKER WEBSITE'.
- Main Dashboard:** A grid of tiles including 'Start a Proposal', 'Business Protection Pathfinder', '3 Steps to Securing Your Clients Legacy', 'Resume a Proposal', 'Reprint a Proposal', 'Biz Data Download Pipeline Construction', 'Easy Quotes', 'Change Password', 'ASK Underwriting', and 'broker360 model portfolio builder'.
- Callout 1:** A green box labeled 'Start a Proposal' with a plus icon. An arrow points to it from a text box: 'You can start a new application in the normal way'.
- Callout 2:** A green box labeled 'Resume a Proposal' with a circular arrow icon. An arrow points to it from a text box: 'New Feature: You can now view your pipeline or Resume a Proposal'.

## Section 1

### Resume your application and viewing your pipeline



You can now view all saved but incomplete proposal and it will allow you to:

- Input the information that you have to hand to hand at that time
- Resume the application
- Clearly see where information is outstanding on the application
- You will have full visibility through an intuitive pre submission pipeline


**Resume Proposal**

Current in progress proposals

Master Code	Agent Id	Product Type	Product	Reference Names	Created	Last Saved	Expires	Premium	Resume	Delete
		Pensions	Complete Solutions bond for personal pensions	Mr Kim Kardashian	23/05/2017	23/05/2017	22/08/2017	£555,000.00	Resume	Delete
		Savings	Pinnacle	Mr Joe Jones	31/05/2017	31/05/2017	30/07/2017	£0.00	Resume	Delete
		Savings	Pinnacle	Mr Walter White	23/05/2017	23/05/2017	22/08/2017	£300.00	Resume	Delete
		Pensions	Complete Solutions FBSA Standard Employee Sited	Mr Jesse Freeman	23/05/2017	23/05/2017	22/08/2017	£1,000.00	Resume	Delete
		Bonds	Signature Bond	Mr George Jackson	31/05/2017	31/05/2017	30/07/2017	£55,000.00	Resume	Delete
		Savings	Pinnacle	Mrs Judy Jackson	07/06/2017	07/06/2017	06/08/2017	£0.00	Resume	Delete
		Pensions	Complete Solutions Company 2	Mr Errol Jackson	07/06/2017	07/06/2017	06/08/2017	£0.00	Resume	Delete
		Savings	Pinnacle						Resume	Delete
		Bonds	Signature 2 Bond						Resume	Delete
		Bonds	Signature Bond						Resume	Delete

First Previous 1 2 Next Last 50 per page

## Tooltips

Where you see the  icon a tooltip and explanation is available.

**Resume Proposal**

Current in progress proposals

Search By:

- Master Code
- Agent Id
- Product Type
- Product
- Reference Names
- Created
- Last Saved
- Expires
- Premium

Other features that will make managing your pipeline as easy as possible.

## 1. Order the Results

### Resume Proposal

Master Code	Agent Id	Product Type	Product	Reference Names	Created	Looser ePOS Applies	Last Saved	Expires
+		Pensions	Complete Solutions Company 2	Mr Joe Smith	10/02/2017	Yes	10/02/2017	11/04/2017
+		Bonds	Signature Bond	Ms Mary Test	10/02/2017	Yes	10/02/2017	11/04/2017
		Protection	Term Life Insurance	Mr Fred Flintstone	10/02/2017	No	10/02/2017	11/04/2017
		Mortgage	Mortgage Life Insurance 8%	Mr Barney Rubble	10/02/2017	No	10/02/2017	11/04/2017
+		Savings	Pinnacle	Ms Judy Jetson	10/02/2017	Yes	10/02/2017	11/04/2017
+		Savings	Pinnacle	Mr joe test	09/02/2017	Yes	09/02/2017	10/04/2017
+		Savings	Pinnacle	Mr Joe Smith	10/02/2017	Yes	10/02/2017	11/04/2017

Clicking the column header will order the results based on that column in **ascending order**.  
Click again to sort in **descending order**

## 2. You can review the and order by Expire Date

The expiry date shows the date the saved application will remain in the pipeline



An application is saved for 60 Days

Master Code	Agent Id	Product Type	Product	Reference Names	Created	Looser ePOS Applies	Last Saved	Expires
+		Bonds	Signature Bond	Ms Mary Test	10/02/2017	Yes	10/02/2017	11/04/2017
+		Savings	Pinnacle	Ms Judy Jetson	10/02/2017	Yes	10/02/2017	11/04/2017
+		Savings	Pinnacle	Mr joe test	09/02/2017	Yes	09/02/2017	10/04/2017
+		Pensions	Complete Solutions Company 2	Mr Joe Smith	10/02/2017	Yes	10/02/2017	11/04/2017
+		Savings	Pinnacle	Mr Joe Smith	10/02/2017	Yes	10/02/2017	11/04/2017
		Protection	Term Life Insurance	Mr Fred Flintstone	10/02/2017	No	10/02/2017	11/04/2017
		Mortgage	Mortgage Life Insurance 8%	Mr Barney Rubble	10/02/2017	No	10/02/2017	11/04/2017

**Hover** on the expiry date to show the number of days left until the expiry date

58 days left

### 3. You can view the Proposal in more detail

Each proposal can be easily expanded to show sections & fields that required more info.

Current in progress proposals

Master Code	Agent Id	Product Type	Product
+		Bonds	Signature Bond
+		Savings	Pinnacle
+		Savings	Pinnacle
+		Pensions	Complete Solutions Company 2
+		Savings	Pinnacle
		Protection	Term Life Insurance
		Mortgage	Mortgage Life Insurance 8%

Click the expand icon to show more

Proposals without this icon cannot show a drilldown as they currently are not part of the save and resume functionality.

### Resume Proposal

Current in progress proposals

Search

1 to 10 of 15

Master Code	Agent Id	Product Type	Product	Reference Names	Created	Last Saved	Expires	Premium	Resume	Delete
+		Pensions	Complete Solutions bond for personal pensions	Ms Kim Kardashian	23/06/2017	23/06/2017	22/08/2017	€555,000.00	Resume	
+		Savings	Pinnacle	Mr Joe Jones	31/05/2017	31/05/2017	30/07/2017	€0.00	Resume	
+		Savings	Pinnacle	Mr Walter White	23/06/2017	23/06/2017	22/08/2017	€300.00	Resume	

Sections/Screens

Payment Details

Missing Mandatory Information & Fields With Errors (4 Fields)

- Will direct debits be paid from a third party bank account?
- On what date in the month do you want direct debits to be collected from this bank account?
- Direct Debit Bank Identifier Code
- Direct Debit International Bank Account Number
- Name of account holder to be debited
- Direct Debit Payer

Administration Details

Commission Details

Click to expand the section

This will show:

- How many pieces of missing info is needed
- Name of the of missing info

### 4. You can view delete an unwanted application

#### Resume Proposal

Current in progress proposals										
Master Code	Agent Id	Product Type	Product	Reference Names	Created	Looser ePOS Applies	Last Saved	Expires	Premium	Resume
		Bonds	Signature Bond	Ms Mary Test	10/02/2017	Yes	10/02/2017	11/04/2017	€20,000.00	Resume
		Savings	Pinnacle	Ms Judy Jetson	10/02/2017	Yes	10/02/2017	11/04/2017	€5,000.00	Resume
		Savings	Pinnacle	Mr joe test	09/02/2017	Yes	09/02/2017	10/04/2017	€0.00	Resume
		Mortgage	Mortgage Life Insurance 8%	Mr Barney Rubble	10/02/2017	No	10/02/2017	11/04/2017	€0.00	Resume

Click to delete the application

#### Warning!

Are you sure want to permanently delete this proposal?

☒ Yes ☐ No

You will be asked to confirm permanent deletion

### 5. Search Functionality

#### Customer Search

The search function will allow you to easily search for your customer.

Type in a customer name. In this case 'Joe'

Current in progress proposals				
Joe				
Master Code	Agent Id	Product Type	Product	Reference Names
		Pensions	Complete Solutions Company 2	Mr Joe Smith
		Savings	Pinnacle	Mr joe test
		Savings	Pinnacle	Mr Joe Smith

All the customers names Joe will show

#### Product Search

The search function will allow you to easily search by product.

Type in a product type In this case 'Savings'

Current in progress proposals			
Savings			
Master Code	Agent Id	Product Type	Product
		Savings	Pinnacle
		Savings	Pinnacle
		Savings	Pinnacle

All the Savings product type will show

## 6. Resume The Application

Master Code	Agent Id	Product Type	Product	Reference Names	Created	Looser ePOS Applies	Last Saved	Expires	Premium	Resume	Delete
		Pensions	Complete Solutions Company 2	Mr Joe Smith	10/02/2017	Yes	10/02/2017	11/04/2017	€3,000.00	Resume	
		Bonds	Signature Bond	Ms Mary Test	10/02/2017	Yes	10/02/2017	11/04/2017	€20,000.00	Resume	

Click the Resume button

This will then relaunch your existing application the customers.

HOME

EXIT WITHOUT SAVING

EXIT, SAVE

Choose Plan

Apply Now

Sign Now

Submit

Personal Details

Contact Details

Plan Owner Details

Premium Details

Money Laundering Details

Payment Details

Fund Details

Administration Details

Commission Details

Pinnacle

How are Regular Premiums to be paid?

Will direct debits be paid from a third party bank account?

On what date in the month do you want direct debits to be collected from this bank account

Direct Debit Bank Identifier Code

Direct Debit International Bank Account Number

Don't know the IBAN? Calculate it here

Name of account holder to be debited

Direct Debit Payer

Direct Debit

IBAN CONVERTER

NEXT

HOME EXIT WITHOUT SAVING EXIT, SAVE

Ensure you select **EXIT, SAVE** if you want to save any changes. Alternatively select **EXIT WITHOUT SAVING** if you want to disregard any changes

## Section 2

Epos will continue from where you last left the application.

**b | line**  
THE NO.1 BROKER WEBSITE

Choose Plan **Apply Now** Sign Now Submit

**Payment Details**

**Pinnacle**

How are Regular Premiums to be paid?

Will direct debits be paid from a third party bank account?

On what date in the month do you want direct debits to be collected from this bank account?

Direct Debit Bank Identifier Code

The direct debit BIC cannot be null or empty.

Direct Debit International Bank Account Number

The direct debit BIC specified is null or empty.

IBAN CONVERTER

Don't know the IBAN? Calculate it here

Name of account holder to be debited

The direct debit bank account name specified is null or empty.

Direct Debit Payer

Direct Debit Payer cannot be null or empty.

The above fields will be required to submit this proposal; Proceed and complete the above fields later

Message displays to show that fields will be needed before submission

**b | line**  
THE NO.1 BROKER WEBSITE

Choose Plan **Apply Now** Sign Now Submit

**Payment Details**

**Pinnacle**

How are Regular Premiums to be paid?

Will direct debits be paid from a third party bank account?

On what date in the month do you want direct debits to be collected from this bank account?

Direct Debit Bank Identifier Code

The direct debit BIC cannot be null or empty.

Direct Debit International Bank Account Number

The direct debit BIC specified is null or empty.

IBAN CONVERTER

Don't know the IBAN? Calculate it here

Name of account holder to be debited

The direct debit bank account name specified is null or empty.

Direct Debit Payer

Direct Debit Payer cannot be null or empty.

The above fields will be required to submit this proposal; Proceed and complete the above fields later

PROCEED ►

A new feature is that you may continue to a different screen in the meantime. Previously you would need to fill in everything on the screen before moving on



## Tracking your Progress

Your progress through an application will be tracked as screens are completed fully.

**b | line**  
THE NO.1 BROKER WEBSITE

Choose Plan ☒ Apply Now ☒ Sign Now ☐ Submit ☐

**Pinnacle**

Please select your regular premium funds

Fund	Percentage
* Diversified Balanced Fund Ser X	* 100

**Next**

**Will highlight that the sections is complete**

**'X' Will highlight that the sections is not complete**

**Irish Life**

**Save**

**Save Complete. This application will be saved for 60 days**

**EXIT**

**HOME EXIT WITHOUT SAVING EXIT, SAVE**

**INVESTMENT**

**Next**

Easy Save function that will save your application for a further 60 days.

**b | line**  
THE NO.1 BROKER WEBSITE

Choose Plan ☒

**Pinnacle**

How much do you want to invest?

On what date do you want to start?

Payment frequency

Do you wish to index your contributions?

Government Levy Amount

Total investment amount

Click investment to add additional once-off investment / single premium

**INVESTMENT**

**Next**

**HOME EXIT WITHOUT SAVING EXIT, SAVE**

**Save**

**Save Complete. This application will be saved for 60 days**

**EXIT**